CONTROLLED POLICY

D03 – PLACEMENT, BOOKING, ALLOCATION AND CANCELLATION POLICY

Policy Reference	D03	**Version**	1.0
Policy Owner	PHSSL Staffing Limited	**Approved By**	Lade Awosika, Director
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Review Date	September 2027	**Status**	Controlled Document
Applies To	PHSSL staff, agency workers and clients involved in temporary assignments and bookings	**Supersedes**	New policy

1. Purpose

This policy sets out how PHSSL Staffing Limited receives client requests, selects and allocates suitable workers, confirms bookings, manages changes and cancellations, and records assignment activity. The aim is to provide a safe, fair, reliable and auditable booking process.

2. Scope

This policy applies to PHSSL employees involved in bookings and compliance, agency and temporary workers, and relevant client interactions. It covers ad-hoc shifts, short-term assignments and longer temporary placements.

3. Core Principles

- No worker will be knowingly allocated outside their verified compliance or competence.
- Booking decisions will be fair, lawful and based on legitimate assignment requirements.
- Clients and workers will receive clear information and timely communication.
- Safety and safeguarding requirements take priority over filling a shift.
- Booking, changes and cancellations will be recorded accurately.

4. Receiving a Booking Request

PHSSL will obtain sufficient information from the client to understand the assignment before proposing a worker. Information should be proportionate to the role and include the hirer, workplace, dates and hours, duties, required experience, qualifications or training, pay-related information, known health and safety risks and any safeguarding-sensitive requirements.

5. Assignment Information

PHSSL will seek and communicate assignment information required under applicable employment-business law. Where information changes materially, PHSSL will update the worker as soon as reasonably practicable.

6. Compliance Before Allocation

Only workers whose compliance status meets the requirements of the assignment may be allocated. A booking must not override a compliance hold, expired mandatory item, right-to-work restriction, safeguarding restriction or competence limitation.

7. Matching and Allocation

Workers will be matched using legitimate criteria such as competence, experience, availability, location, client requirements, compliance, continuity and safe working hours. Allocation decisions must not be based on unlawful discrimination.

8. Client Preferences

PHSSL may take account of legitimate client requirements and previous performance information. Discriminatory requests relating to protected characteristics will not be accepted unless a lawful occupational requirement or other legal exception genuinely applies.

9. Worker Availability

Workers are responsible for keeping their availability reasonably current and should only accept assignments they can reliably attend. Being registered with PHSSL does not itself guarantee any minimum number of assignments unless expressly agreed otherwise.

10. Offer of Assignment

An assignment offer should provide enough information for the worker to make an informed decision. Workers may ask reasonable questions about duties, location, hours, risks or requirements before accepting.

11. Acceptance and Confirmation

A booking becomes confirmed when acceptance has been recorded through PHSSL's agreed process. Workers should not assume a shift is confirmed merely because availability was discussed. PHSSL should keep an auditable record of confirmed bookings.

12. Double Booking

Workers must not knowingly accept overlapping assignments that they cannot fulfil. If a booking conflict is discovered, the worker must contact PHSSL promptly rather than choosing one assignment without notice.

13. Changes Before the Assignment

Where a client changes the start time, duration, location, duties or other material terms, PHSSL will communicate the change to the worker. If the change materially affects suitability, safety or compliance, the booking must be reassessed.

14. Changes During the Assignment

Workers should notify PHSSL if they are asked to perform materially different duties or work at a different location, especially where this creates new risks, requires additional competence or affects the agreed assignment information.

15. Worker Cancellation

A worker who cannot attend must notify PHSSL as early as reasonably possible and provide sufficient information for the booking to be managed. Genuine illness and emergencies will be considered fairly. Repeated avoidable late cancellations may lead to review.

16. No-Show or Failure to Attend

Failure to attend a confirmed booking without reasonable notification is a serious reliability concern. PHSSL will establish the circumstances before deciding whether support, warning, restriction or other action is appropriate.

17. Client Cancellation

Clients should cancel bookings in accordance with agreed terms and provide as much notice as possible. PHSSL will inform the worker promptly. Any payment consequence will depend on applicable law and contractual terms; PHSSL will not promise payment that is not contractually or legally due.

18. Short-Notice Cancellation

Where a cancellation occurs at short notice or after the worker has travelled or arrived, PHSSL will record the circumstances and apply the relevant client and worker terms. Repeated problematic cancellations may be escalated through client management.

19. Replacement Workers

Where a confirmed worker becomes unavailable, PHSSL may seek a suitable replacement. The replacement must meet the same mandatory compliance and competence requirements; urgency must not result in unsafe substitution.

20. Late Arrival

Workers should report expected lateness promptly. PHSSL may notify the client and record the event. Repeated avoidable lateness may be addressed under performance or conduct arrangements.

21. Early Release by Client

If a client ends a shift or placement earlier than planned, PHSSL will record the reason and clarify any pay or contractual implications. Early release does not automatically mean the worker has committed misconduct.

22. Worker Request to Leave Early

A worker should not leave an assignment early without appropriate handover or notification except where immediate safety requires withdrawal. PHSSL and the client should be contacted as soon as practicable.

23. Safety and Safeguarding

Where a booking or assignment raises a safety or safeguarding concern, protection of people takes priority over filling or continuing the shift. PHSSL may suspend, change or cancel an allocation while concerns are assessed.

24. Working Time and Fatigue

Booking staff must consider known working hours and fatigue risks. A worker should not be allocated where available information indicates that accepting the booking would create an unacceptable safety risk or breach applicable working-time requirements.

25. Continuity and Familiarity

Where beneficial and practicable, PHSSL may support continuity by allocating workers familiar with a client or setting, provided this does not override compliance, fairness, availability or safe working requirements.

26. Communication With Clients

PHSSL will maintain professional communication about confirmations, changes, cancellations and replacements. Clients should be informed promptly of material issues affecting fulfilment of a booking.

27. Communication With Workers

Booking communications should be clear, respectful and capable of being evidenced. Workers must be given an appropriate contact route for booking queries and urgent assignment issues.

28. Booking Records

PHSSL will retain appropriate records of client requests, worker allocation, confirmations, changes, cancellations and relevant communications. Records should support payroll, invoicing, compliance, complaint handling and audit.

29. Timesheets and Booking Reconciliation

Booked hours and submitted timesheets may be compared to identify discrepancies. A difference must be investigated rather than automatically treated as fraud or automatically paid without verification.

30. Direct Approaches and Transfer

If a client wishes to engage a worker directly or outside the existing booking arrangement, the matter should be referred to PHSSL for management under applicable client terms and employment-agency legislation. Workers must not be charged an unlawful transfer or work-finding fee.

31. Booking Staff Responsibilities

- Obtain sufficient assignment information.
- Check compliance and restrictions before allocation.
- Communicate offers and changes accurately.
- Record acceptance, cancellation and replacement activity.
- Escalate safety, safeguarding, fatigue or discriminatory requests.
- Do not bypass controls to meet client pressure.

32. Worker Responsibilities

- Keep availability current.

- Review assignment details before accepting.
- Attend confirmed bookings punctually.
- Notify PHSSL promptly of lateness, cancellation or material concerns.
- Do not accept duties outside competence or clearance.
- Submit accurate timesheets and cooperate with booking queries.

33. Client Responsibilities

- Provide accurate assignment and risk information.
- State legitimate competence and compliance requirements.
- Provide local induction and safe systems of work.
- Notify PHSSL promptly of booking changes or cancellations.
- Provide appropriate confirmation of hours worked.
- Raise performance or safeguarding concerns promptly and fairly.

34. Escalation and Repeated Problems

Repeated cancellations, non-attendance, booking errors, unsafe requests or communication failures will be reviewed to identify whether changes to allocation, client terms, worker availability, training or internal controls are required.

35. Related PHSSL Staffing Policies

- A01 Governance and Quality Assurance Policy.
- A04 Complaints, Concerns and Service Feedback Policy.
- B01 Safeguarding Adults Policy.
- B02 Safeguarding Children and Young People Policy.
- B04 Equality, Diversity, Inclusion and Human Rights Policy.
- C03 Induction, Training, Supervision and Competency Policy.
- C06 Lone Working and Worker Safety Policy.
- D01 Temporary Worker / Agency Worker Management Policy.
- D02 Worker Registration, Vetting and Compliance Policy.
- D04 Working Time, Rest Breaks and Fatigue Management Policy.
- D05 Timesheets, Pay, Holiday Pay and Payroll Policy.

36. Monitoring and Review

PHSSL will monitor booking and allocation performance through fill rates, cancellations, no-shows, incidents, complaints, worker and client feedback, compliance exceptions and governance review. This policy will be reviewed at least annually, or sooner following significant legal or regulatory change, serious incidents, audit findings or identified learning.

Approved by	Lade Awosika
Position	Director
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